Tips for creating Pivot Tables within Excel

Pivot Tables are a means of creating cross-tab tables for the purpose of further understanding your data.
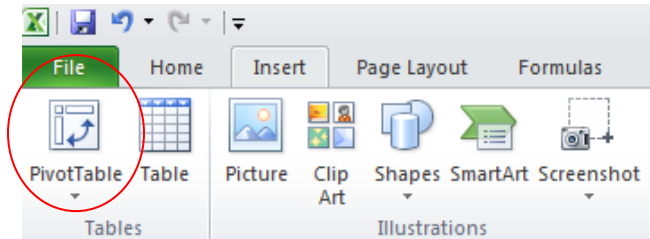
Video Tutorial:

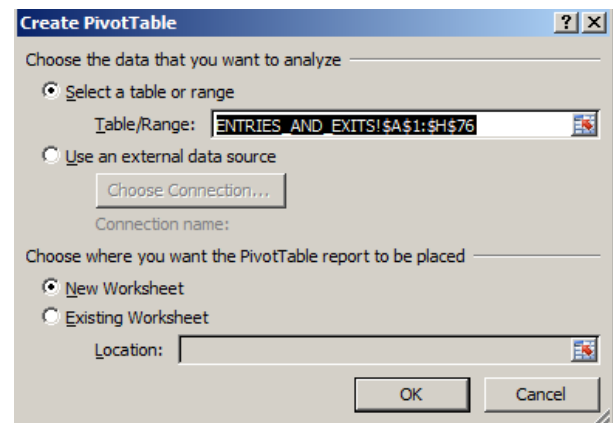The following five-minute tutorial provides a good outline on how to create a pivot table:

http://www.youtube.com/watch?v=k_PzoaUrW4A

Written Tutorial

To create an Excel Pivot Table, go to the Insert tab and choose "PivotTable", as seen to the right.

A 'Create PivotTable' window will then appear, and will prompt you to select a table or range of the data you would like to analyze. Excel will generally highlight your data for you, and display the selection as 'marching ants'. Review the selection to decide if it is the correct dataset you would like to review, or if you need to revise it.

The 'Create PivotTable' window will also ask you where you would like the PivotTable placed. You may either place the table in a new worksheet, or in your existing worksheet. Most choose to place it in a new worksheet.

Creating the Table

Once you have selected your data, click 'Ok'. You will then see a blank table, as shown to the right. The 'PivotTable Field List' will also appear (as seen on page 2). The Field List contains all of the column headers (or 'Fields') that you included in your data selection. It is up to you to choose which fields you would like to include in your table, and how you would like it displayed.
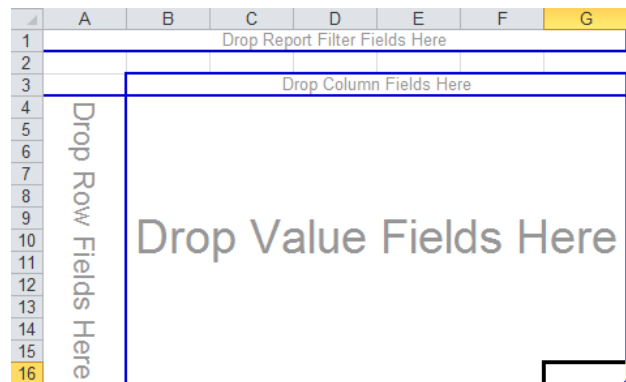
Create the Pivot Table by clicking and dragging the Pivot Table Field List items you want to analyze into one of four areas:

- The '**Values**' area is where your data is displayed, and quantifies your main data question.
- The '**Row Labels**' and '**Column Labels**' are the fields you would like your data quantified in relation to.
- The '**Report Filter**' area allows you to choose the option of summarizing data items by only showing data related to a specific category or classification.

PivotTable Field List

Choose fields to add to report:

- ☑ **CHILD_ID**
- ☐ CHILD_NAME
- ☐ CHILD_GENDER
- ☐ CHILD_DOB
- ☐ CHILD_PERSON_TYPE
- ☐ CHILD_RACE
- ☐ CHILD_ETHNICITY
- ☐ CHILD_HISPANIC
- ☐ CHILD_DISABILITY
- ☐ DISABILITIES
- ☐ ICWA_CHILD
- ☐ PLACEMENT_ID
- ☐ PLACING_COUNTY
- ☐ REMOVAL_MANNER
- ☐ REMOVAL_DATE
- ☐ PLCMT_BEGIN_DATE
- ☐ PLCMT_END_DATE
- ☐ END_REASON
- ☐ SERVICE_TYPE
- ☐ PLACEMENT_SETTING
- ☑ **PLACEMENT_TYPE**

Drag fields between areas below:

▼ Report Filter	▦ Column Labels
	CHILD_AGE_RANGE ▼

▦ Row Labels	Σ Values
PLACEMENT_TYPE ▼	Count of CHILD_ID ▼

☐ Defer Layout Update   Update

***An example of how to create a Pivot Table*:**
Let's say you are working within the Placement Activity and Detail (PAAD) Report (SM10A112) and you are interested in determining the placement types for children in OHC, by their age range. One way of organizing this would be to:

- Select and drag the 'PLACEMENT_TYPE' field into the **'Row Label'**. This displays your data by placement type.

- Select and drag the 'CHILD_AGE_RANGE' field in the **'Column Labels'**. (Note that this field is not on display in the graphic to the left, but is available in the Field List). This displays your data by the four different age ranges.

- Select and drag the 'CHILD_ID' field in the '**Values Label'**. Be careful to note how Excel chooses to present this data. For example, Excel may choose to present this data as the sum of all CHILD IDs, rather than as the count of all Child IDs. You may change what data is displayed by clicking the 'Values Label', and selecting "Value Field Settings". You will be prompted to clarify if you would like the data summed, counted, averaged, etc. As we want the number of kids, we are choosing 'Count'.

Please also note that some children will be duplicated in this table's results as this data counts *all instances* of where a CHILD_ID was noted in the data, which could be due to multiple placements for the same child. If you want the number of unduplicated children, you will need to first remove the duplicates prior to running your table.

Drag fields between areas below:

▼ Report Filter	▦ Column Labels
	CHILD_AGE_RANGE ▼

▦ Row Labels	Σ Values
PLACEMENT_TYPE ▼	Count of CHILD_ID ▼

Move Up
Move Down
Move to Beginning
Move to End
▼ Move to Report Filter
▦ Move to Row Labels
▦ Move to Column Labels
Σ Move to Values
✕ Remove Field
🔢 Value Field Settings...

☐ Defer Layout Update

Your Completed Pivot Table

After completing the steps above, your pivot table should look as follows:

	A	B	C	D	E	F	G
1	**Pivot Table comparing the count of the Child_ID by their placement type, and their age range.**						
2	January 1, 2012 through September 30, 2013						
3							
4	Count of CHILD_ID	CHILD_AGE_RANGE ▼					
5	PLACEMENT_TYPE ▼	Age 0-4	Age 5-11	Age 12-14	Age 15 and over	(blank)	Grand Total
6	Adoption	1					1
7	Detention		4	92	556		652
8	Foster Home	2192	1871	453	500		5016
9	Group Home	17	5	30	210		262
10	Institutions	314	17	11	80		422
11	Kinship Care	336	374	76	69		855
12	Missing From Out-of-Home Care	1	1	2	2		6
13	RCC		37	87	138		262
14	Shelter	34	71	220	497		822
15	Supervised Ind. Living				5		5
16	Treatment Foster Home	48	106	48	75		277
17	(blank)						
18	**Grand Total**	2943	2486	1019	2132		8580

With this data, you can do simple analyses to see where younger children are placed as compared to older children. For example, we see that of the 8,580 total placements of children in Out-of-Home-Care statewide, the majority of placements have been made in a foster home setting (5,016 placements of the 8,580 total placements, or 58.5 percent).   Looking further into the foster home setting, we see that a total of 4,063 of the 5,016 foster home placements, or 81.0 percent, have been made for those children who are aged 0-11 years old.

When looking at the placement types of older youth, one would see that of the 2,132 placements of children aged 15 and older, 556 placements (26.1 percent) are within detention, 500 placements (23.5 percent) are within foster care, and 497 placements (23.3 percent) are within shelters. Therefore, when comparing the overall number of placements of younger children to placements of older children, we see that younger children are placed to a greater degree in the foster home setting as compared to older children.

This is just an example of the types of analyses that can be done to better understand your population through use of pivot tables. It is likely that these analyses will spark further questions, which you can continue to explore through use of other pivot tables.